

TxDOTCONNECT Reference Guide Engineer's Estimate

Table of Contents

1.	Introduction	5
1.1	L. Purpose of this Document	5
1.2	2. Reference Guide Key	5
1.3	3. Feature Key	5
2.	Login Screen	7
2.1	L. Sign In	7
2.2	2. Forgotten Passwords	7
2.3	3. Idle Session Security Timeout	7
2.4	1. Extended Session Security Logout	7
3.	Home Page	8
3.1	L. Top Menu Bar	8
3.2	2. My Tasks	9
3.3	3. My Group List	10
3.4	1. Task Assignment	11
4.	Tools Menu	12
4.1	L. Help	12
4.2	2. Reporting	13
4.3	3. Bulk Upload	16
4.4	1. Profile	18
5.	Project Search	19
5.1	L. Search Feature	19
5.2	2. Search Results	20
5.3	3. Search Results Column Headers	20
5.4	1. Select Project	20
5.5	5. Create Project	20
6.	Copy & Save Project	21
6.1	L. Copy without Engineer's Estimate	21
6.2	2. Copy Engineer's Estimate to Existing Project	22
6.3	3. Save Project	22
7.	Project Header	23
7.1	L. *Project ID	23
7.2	2. *Project Name	23
7.3	3. *Project Stage	23
7.4	1. *Project Status	24
7.5	5. *Project Type	24

	7.6.	*Project Subtype25		
	7.7.	*District	25	
	7.8.	*County	25	
	7.9.	*Highway	25	
	7.10.	*Control Section	25	
	7.11.	Letting Estimate	25	
	7.12.	*Estimated Let Date	25	
8.	E	Engineer's Estimate Page	26	
	8.1.	Engineer's Estimate Page Sections	26	
	8.2.	Design	27	
į	8.3.	Details	29	
	8.4.	Estimate	30	
	8.5.	A+B	35	
į	8.6.	Created By & Created Date	35	
9.	5	Specifications List	36	
!	9.1.	Specifications List Page Sections	36	
!	9.2.	Standard Specifications	37	
9	9.3.	Special Specifications	38	
!	9.4.	Special Provisions	39	
!	9.5.	000 Provisions	39	
10	. 9	Sealing & Summary Page	40	
	10.1.	Seal Table	40	
	10.2.	Seal Button	41	
11	. F	Resources Page	42	
	11.1.	Resources Page Sections	42	
	11.2.	Project Managers	43	
	11.3.	Resources	43	
	11.4.	External Resources Assignment	44	
	11.5.	Local Government	45	
12	. 9	Specifications Request Management	46	
	12.1.	Creating a Specifications Request	46	
	12.2.	Completing the Specifications Request Form	47	
	12.3.	Departmental Material Specifications (DMS) and Test Procedures Requests	56	
	12.4.	Checking the Status of Specifications Request	58	
	12.5.	Specifications Request Form Workflows	60	
	12.6.	Reviewing Specifications Requests	62	
	12.7.	Additional Steps for Specifications Coordinators	64	

13.	Lett	ing Module: Contract Inquiry Search	.65
13.	1.	Contract Inquiry Search	.65
13.	2.	Actual Let Date Search Feature	.65
13.	3.	Search Results	.66
14.	Revi	ision History	.67

1. Introduction

1.1. Purpose of this Document

TxDOTCONNECT is an information technology solution to automate the delivery of TxDOT's transportation programs, Projects, and right of way. It will replace the functionality from up to 40 Engineering Operations systems. It impacts both internal and external stakeholders to the agency. This includes individuals who use legacy systems to input data regarding TxDOT projects, as well as those individuals that rely on that information for decision-making purposes.

This document is a guide to navigating the Engineer's Estimate functionality within **TxDOTCONNECT** and performing tasks according to security roles.

1.2. Reference Guide Key

This reference guide uses symbols and color to emphasize certain points. These are described below.

Tips This symbol identifies tips and benefits.	Ordered Lists Processes are presented with blue numbers.
Important This symbol indicates an important note that should be read carefully.	Unordered Lists Lists are presented with bullets.
* Red Stars	Bold Text
Required fields are identified with a red star (*). These fields must be completed in a new project before saving a project.	Where possible, buttons and fields are identified with images of the button or field. Otherwise, they're identified with bold text.

1.3. Feature Key

TxDOTCONNECT contains several types of buttons and fields. These are described below.

Feature	Example	Description
Button	Close	An interactive part of the screen that provides quick and basic functions. It is usually labeled with its purpose.
Add from List	H	A button that allows the user to select one or more options from a Pop-Up Window.
Check Box	•	A small box that, when selected, enables or selects a certain feature.
Date Picker	MM/DD/YYYY	A button that allows the user to select any date from any year.
Drop-Down Menu	•	A field that allows the user to select from predefined values. It also allows typing to skip to a specific value.

Expand/Collapse	••	A button that, when clicked, expands • or collapses • a section of a page.
Field		An interactive part of the screen where any value may be typed. Remember to follow the guidelines for the applicable business area.
Icon	**	An image, usually a clickable button, that represents a specific entity.
Left Navigation Menu	PROJECT INFORMATION Location Project Details Letting FUNDING & ESTIMATE Funding Q Estimated Cost	A menu that appears to the left of all project pages. Click an option to display that page. The menu also expands to show all available sections on the selected page.
Pop-Up Window	Acception Projects List Name Nam	A small screen that displays information relevant to an area being edited or viewed. The popup window remains on the screen until an action has been completed.
Page	March Marc	The full screen of detailed information displayed after a project or page option has been selected. These are often divided into multiple selections.
Radio Button	•	A small, interactive button that allows the user to select from one of a few options.
Section	© Through Sharefflow, Same Market Add, Sharefflow, Sharefflow, Add, Sharefflow, Sharefflow	A part of a page that contains information specific to a certain topic or area. These are clearly titled, with the ability to expand or collapse.

2. Login Screen

The login screen is the first screen that appears when accessing the TxDOTCONNECT web address.

2.1. Sign In

Internal users can sign in with their TxDOT credentials.

- Navigate to TxDOTCONNECT in the internet browser.
- **2.** Enter your TxDOT **User Name** in the Username field.
- **3.** Enter your TxDOT **Password** in the Password field.
- 4. Click sign In





TxDOTCONNECT works best in **Google Chrome** for most purposes but will also function in Internet Explorer 11 and FireFox.

2.2. Forgotten Passwords

If you have issues logging in to TxDOTCONNECT, contact the help desk at **(512) 302-HELP (4357)** or open a **TxDOTNow ticket** using the link on the screen.



Requesting a password reset for the application resets the network password.

2.3. Idle Session Security Timeout

For security purposes, once a session in TxDOTCONNECT is idle for 20 minutes, the system logs you out.

The **Session Expired** message appears.



2.4. Extended Session Security Logout

For security purposes:

If a session in TxDOTCONNECT has lasted longer than four hours, TxDOTCONNECT will log the user out and require the user to log back into TxDOTCONNECT, before continuing to work.

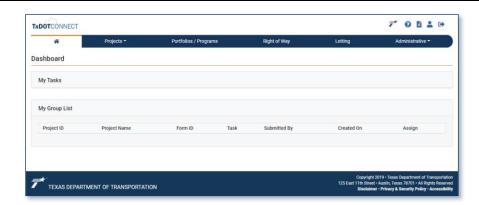
3. Home Page

The TxDOTCONNECT **Home Page** contains the **Top Menu Bar** and the **Dashboard**, which includes **My Tasks** and **My Group List**.

3.1. Top Menu Bar

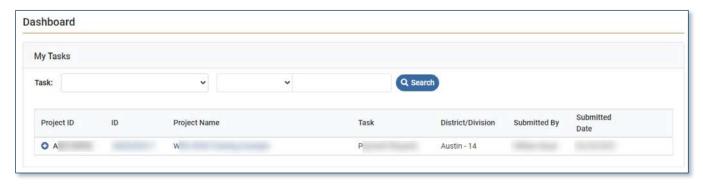
The **Top Menu Bar** appears at the top of every page, and includes these features:

- Click on any page to return to the Home Page.
- Click Projects to search for a project.
- Click Portfolios / Programs to manage programs like the UTP. For more information, refer to the Portfolios & Programs Reference Guide.
- Click Letting to perform a <u>Contract Inquiry.</u>
- Click Administrative to manage specification requests.



3.2. My Tasks

My Tasks contains information if a task is assigned in TxDOTCONNECT. Tasks include review and approval of decisions for workflow items, such as Specification Requests. You can review and respond to the request within My Tasks. This section contains the fields described below.



Field	Description	
Project ID	The project identifier for which the request was submitted. Click to expand the task and view more details and options.	
ID	The unique identifier for the form or request. Click the ID to navigate to the form or request.	
Project Name	The project name for which the request was submitted. Click the Project Name to navigate to the project.	
Task	The name of the task being reviewed.	
District/Division	The name and number of the district or division from which the request was submitted.	
Submitted By	The person who submitted the request.	
Submitted Date	The date the request was submitted.	
Response Selection Approve Return Do Not Approve	 Radio buttons for response selection. Approve - the request will be approved and move forward in the workflow. Return - the request will be returned to the submitter to make changes and resubmit. Note: Resource Requests do not include this option. Do Not Approve - the request will be canceled and will not move forward in the workflow. 	
*Comments	This field is intended for comments to clarify the response. This field is required if Return or Do Not Approve are selected.	
⊘ Submit	Click Submit to submit the response and finalize the request.	

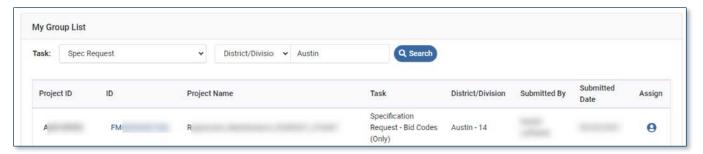
3.3. My Group List

My Group List allows supervisors and coordinators to assign tasks to individuals within their workgroup. The individual to whom the task is assigned will then see the task in their My Tasks list.



If a workflow item is routed to a single individual, it will bypass the My Group list and go directly to the individual's My Tasks list.

This section displays the information described below.



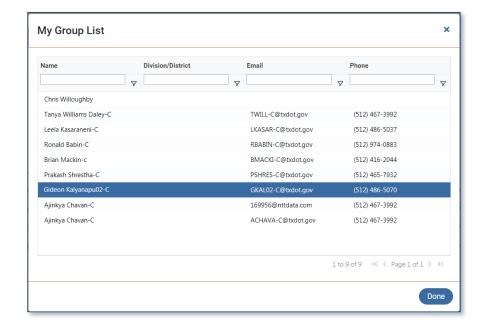
Field	Description	
Project ID	The project identifier for which the request was submitted.	
ID	The unique identifier for the form or request. Click the ID to navigate to the form or request.	
Project Name	The project name for which the request was submitted. Click the Project Name to navigate to the project.	
Task	The name of the task being requested.	
District/Division	The name and number of the district or division from which the request was submitted.	
Submitted By	The person who submitted the request.	
Submitted Date	The date the request was submitted.	
Assign Task	Click = to select a team member to assign the request.	



Click on a task in My Group List to open the Task Assignment window.

- Use the column headers to filter or sort the list of available resources.
- 2. Select an individual to whom to assign the task.
- 3. Click one to complete the assignment.

The task will disappear from the My Group List section of the Dashboard, and the selected individual will now see the task in My Tasks.



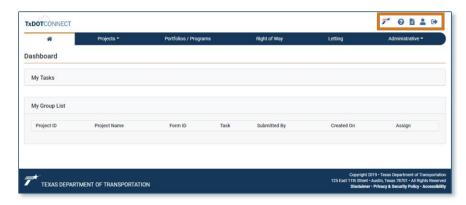
4. Tools Menu

The Tools Menu appears in the upper right corner of every page in TxDOTCONNECT.



The Tools Menu consists of the following features:

- Click to navigate to www.txdot.gov.
- Click to access Help for any page in TxDOTCONNECT.
- Click to access the Reporting feature.
- Click to access the Bulk
 Upload feature (available for
 certain roles only).
- Click to access the Profile page.
- Click to Log Out of TxDOTCONNECT.





Some roles have access to the Bulk Upload feature. For more information, see the **Project Information Reference Guide**.



These and other buttons in TxDOTCONNECT have **Tool Tips** available. Hover over them to read a reminder of their function.

4.1. Help

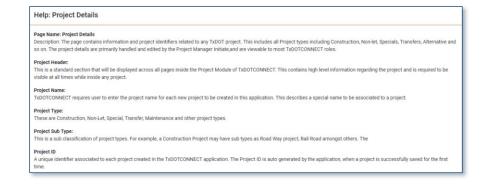
The **Help Page** displays information about the sections and fields on the current page. Click **?** to open the Help page.



Help opens in a separate browser window, to prevent replacing the current page.



Sections and fields are described in the order they appear on the page in question, not in alphabetical order.



4.2. Reporting

The Reporting Page allows you to access and run automated reports.

- 1. Click to open the Reporting Page.
- 2. Double-click the **root** folder (if it is not already open).
- Double-click the Reports folder (if it is not already open) to display the Report Categories.
- 4. Select the desired Report Category.
- Select the desired Report Name.

The **Report Options** window will open.

6. Select the search criteria.

Depending on the report type, there may be multiple search criteria available.

There are several buttons on the **Report Options** window:



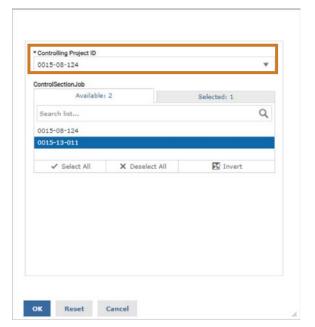
- Click Select All to select all values in the list.
- Click X Deselect All to deselect all values in the list.
- Click Invert to select all values except the current selections.
- If the list of search criteria is too long to fit in the window, click the = symbol underneath these buttons, then drag to resize the list of criteria.



To select all but a few values, click Select All ,then de-select the ones that are not needed.







There are multiple criteria depending on the Report type. Make sure you complete all criteria with an asterisk (*).





To review all the criteria you have selected, click the **Selected** tab in the Report Options window.

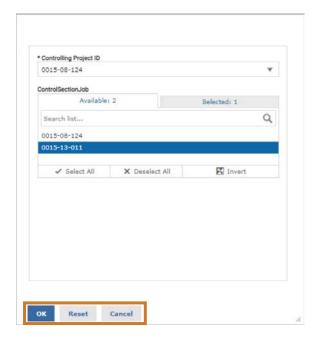


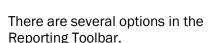
- Click to generate the report based on the current criteria.
- Click Reset to remove all criteria selections.
- Click Cancel to cancel the report selection.

Once the selections are complete,

7. Click ok.

The report will display.









- Click to export a report. We describe this in more detail below.
- Click to undo, redo, or undo all actions.
- Click to open the Report Options window and select criteria again.
- Click Back to return to the main Reporting page.
- Use + 100% to zoom in, zoom out, or select a zoom level.
- Use search report Q > to search for terms within the report. The arrow keys navigate through the search results within the report.
- Use Tage 1 of 4 > > to navigate to the first, previous, next, or last page in the report.



In most cases, use **XLSX** for Excel reports.

The following options are available to export the report

Portable Document Format (.pdf)

This produces a formatted document that cannot be edited.

Excel Spreadsheet (.xls)

This produces a spreadsheet that is compatible with versions of Excel prior to Excel 2007. **This is not common.**

Comma Separated (.csv)

This produces a spreadsheet without formatting, which can be useful for uploading into other software.

• Rich Text Format (.rtf)

This produces a text file with minimal formatting, that can be edited further.

XLSX Excel Spreadsheet (.xlsx)

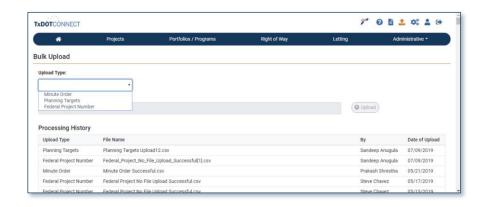
This produces a spreadsheet that is compatible with versions of Excel from Excel 2007 and after. **This is much more common than .xls.**

4.3. Bulk Upload

The **Bulk Upload** feature allows users with certain roles to update data on many projects at once by uploading a single spreadsheet.

Click **Bulk Upload** in the Tools Menu to navigate to the **Bulk Upload** Page.



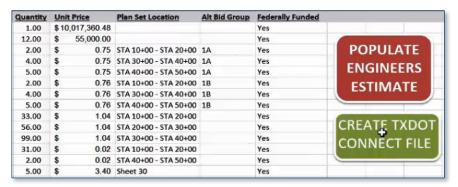


Many data types can be uploaded. This Reference Guide describes only the Engineer's Estimate Bulk Upload.

Data Type	Authorized Security Roles
Engineer's Estimate	Professional Engineer, Professional Engineer Consultants, Engineer's Estimate Coordinator, Engineer's Estimate Coordinator Consultant, Landscape Architect, District Project Managers, Design Coordinator

Populate the Design Division workbook with the data you wish to use to update projects in TxDOTCONNECT.

- The Design Division workbook generates the appropriate template once complete.
- The template must be saved as a .CSV file or the upload will not be accepted.



- Data on the final tab titled Engineers Estimate Bulk Upload must be formatted according to the example shown.
- For instructions on how to enter Bid Items directly into the spreadsheet, see the first tab titled Instructions.



Observe the following requirements before uploading your engineer's estimate into TxDOTCONNECT:

- The project's engineer's estimate must not be set to **Division Review** or **District Office Review**. More information about **Estimate Review** can be found in the **Engineer's Estimate Details section**.
- Mobilization can only have a Quantity up to 1 decimal point. All other bid codes can have a Quantity up to 3 decimal points.
- **Category of Work** in the spreadsheet must correspond with options in the Category of Work Dropdown menu in the Engineer's Estimate grid.
- NBI/Utility IDs must be numeric.

Link: Engineer's Estimate Spreadsheet Template



The Engineer's Estimate spreadsheet template is programmed with formulas essential to performing a successful upload into TxDOTCONNECT and **must not be altered** (if an issue arises that requires an update to the spreadsheet, please contact the Design Division at DES_PD_WEBHELP@txdot.gov for assistance).



- 1. Select the desired Upload Type once on the Bulk Upload Page.
- You will only be able to see the upload type(s) for which you have permission.
- 2. If the project or district requires it, select the **Probability Confidence Level** from the dropdown.
- 3. Click Browse to browse for the correct file.
- 4. Select the desired Excel file.
- 5. Click Quipload Upload Button to upload the file.

If there is already data in the project's Engineer's Estimate grid, TxDOTCONNECT will generate a warning message.

- Click OK to proceed with the upload and overwrite all current information with the your spreadsheet.
- Click **Cancel** to cancel the upload.

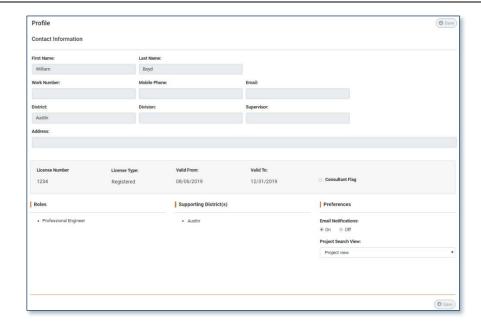
4.4. Profile

The **Profile** page contains the following information:

- Contact Information this information is populated from the TxDOT Active Directory.
- Roles this lists the assigned security role (or roles).
- Supporting District(s) the assigned district. Division staff may support multiple districts.
- Preferences adjust settings for Email Notifications (on or off) and Search View.



Click to save changes to preferences.





To change or add a Security Role, contact **TxDOTNOW** (512) 302-HELP (4357) or open a **TxDOTNow ticket**.



Professional Engineers and Professional Engineer-Consultants must update their current license by contacting the help desk at (512) 302-HELP (4357) or opening a TxDOTNow Ticket.

5. Project Search

The **Project** tab in the Top Menu Bar leads to the **Project Search** page.

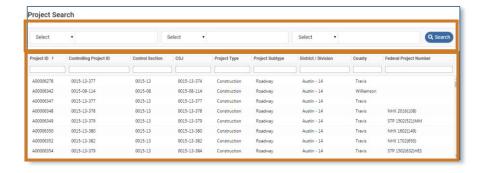
A Projects Portfolios / Programs Right of Way Letting Administrative ▼

This page differs depending on whether the user is a district or a division employee.

- **District staff** will see active (not all) projects in their district by default.
- Design Coordinators, other Division Staff, MPOs and FHWA will see no projects until they perform a search.
- External Consultants will see no projects until they perform a search and will be able to find only those
 projects to which they have been invited.

There are two parts on this page:

- The Search feature
- The Search Results



5.1. Search Feature

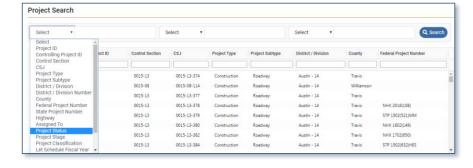
To search for a specific project,

- Use the Select drop-down menu to select search criteria.
- 2. Enter a search term.
- 3. Click Q Search.

The **Search Results** will appear.



Up to three search criteria can be selected, and up to three search terms entered.





If no projects match the search criteria, the message below will display:

No projects available to display for your search criteria.



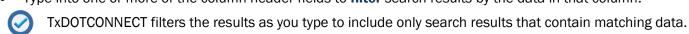
Not finding what you're looking for? Remember these tips:

- Is the project closed? Select Project Status in the Search Criteria and type "Closed."
- Was the project created in DCIS? Select Project Subtype in the Search Criteria and type "Legacy."
- Is the project in a different district? Select **District/Division** in the Search Criteria and type the district's name.
- Remember: You can search by partial information there is no need for a "wildcard" character.

5.2. Search Results



- Click a column header to sort search results by the data in that column. Click again to reverse the order.
- Type into one or more of the column header fields to **filter** search results by the data in that column.





If no projects match the filter criteria, the message "No results found." will display.

5.3. Search Results Column Headers

The current list of search column headers for **Project View** appears below.

- Project ID
- Controlling Project ID
- Control Section
- CSJ
- Project Type
- Project Subtype
- District/Division
- County
- Federal Project Number
- State Project Number
- Highway
- Assigned To

- Project Status
- Project Stage
- Project Classification
- Let Schedule Fiscal Year
- Date Created
- ROW CSJ

*Only if used to search:

- Limits To
- Limits From
- Estimated Let Date

5.4. Select Project

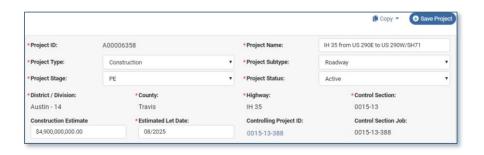
- Click a project once to highlight it.
- Double-click a project to open it.

5.5. Create Project

If your Security Role allows you to create a project, see **Create Project** in the **Project Development Reference Guide** for instructions.

6. Copy & Save Project

At the top of every page, above the Project Header, there are two buttons: **Copy** and **Save Project**.



6.1. Copy without Engineer's Estimate

This feature copies all project information to a new project.

To complete this process,

- 1. Click ^L Copy ▼.
- 2. Select Copy without Engineer's Estimate.
- 3. Type a unique Project Name.
- 4. Click Copy.



The new project will be created with:

- A unique Project ID
- A unique Project Name
- All Funding lines (but the status of all funding lines will be cleared)



The following information will **not** copy over:

- Project Identifiers
 - The CSJ will populate once the new project is saved.
 - The CCSJ will be set as the new project's CSJ.
- Proposed Bridge Assets
- Statewide Transportation Improvement Programs
- Ancestors & Descendants
- All information on the Letting Page.
- All forms submitted to workflow.



6.2. Copy Engineer's Estimate to Existing Project

This feature copies the Engineer's Estimate to an **existing** project.

To complete this process,

- 1. Click Copy
- 2. Select Copy Engineer's Estimate to Existing Project.
- 3. Type a known CSJ.
- 4. Click Enter

The CSJ and Project Name will populate to validate the CSJ entered.

5. Click Copy

The engineer's estimate of the current project will be copied to the referenced existing project.



If an Engineer's Estimate has already been entered in the referenced project, it will be replaced.

1234-56-789

1234-56-789

CSJ

Cancel



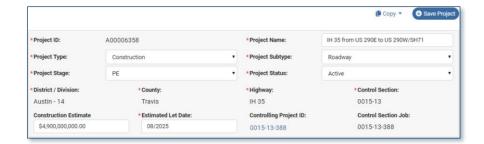
Bridge items, Quantities, and Plan Set Location will not be copied.

6.3. Save Project

Anytime a project is created or updated in TxDOTCONNECT,

must be clicked for changes to be saved in the system and retrieved later.

If any required fields have been left blank, or if there are any potential errors, TxDOTCONNECT will display a detailed error message describing the requirements.



Copy Engineer's Estimate to Existing Project

Project Name

Enter

Сору

7. Project Header

The **Project Header** appears at the top of every Project page. It contains critical, high-level project information.

The header contains the fields described below:



Field			Description
7.1.	*Project ID	The unique primary identifier. This field is populates the first time the project is saved.	
7.2.	*Project Name	Each project requires a unique name. Recommended format: [Highway Number] [Limit From] [Limit To] or [Year Seal Coat] [Highway]	
7.3.	*Project Stage	This indicates where the project is in its lifecycle. The possible values depend upon the Project Type .	
	Construction Project Type	Initiate	Indicates a project is in the conceptual stage. No funding is assigned to the project.
		Planning	Indicates internal resources are working to develop the project scope. No external vendors are assigned to the project.
		Preliminary Engineering (PE)	Indicates preliminary studies for a project have begun, including environmental, surveys, geotechnical studies, hydrologic/hydraulic analysis, traffic studies, etc.
		Plans, Specifications, & Indicates resources are working on development and approval of engineering plans, specifications and estimates in preparation for letting.	
		Ready to Let	Indicates the project meets agency criteria for letting process.
		Letting Indicates the project has been advertised for letting and is progressing through the letting process.	
		Construction Indicates a project has been let, awarded and is ready for construction to begin.	
		Closed Indicates deliverables and final reconciliation processes are complete for project.	
		Canceled	Indicates termination of a project prior to its completion.

All Other Project Types	, , , , , , , , , , , , , , , , , , ,	
	Planning Indicates internal resources are working to develop the project scope. No external vendors are assigned to the project.	
	Executing Indicates internal or external resources have been assigned to deliver the project scope.	
	Closed	Indicates deliverables and final reconciliation processes are complete for project.
	Canceled	Indicates termination of a project prior to its completion.
7.4. *Project Status	This indicates whether the project is currently being worked to develop or execute.	
	Active Indicates that the project is in progress.	
	Inactive Indicates the FHWA guidelines of Inactive projects.	
	Paused Indicates that TxDOT has temporarily stopped work on the projects.	
	Closed Indicates deliverables and final reconciliation processes are complete for project.	
	Canceled	Indicates termination of a project prior to its completion.
	Reopened	Indicates a closed or cancelled project that has been reopened to allow for additional financial reconciliation to be performed.



- A Closed Status will automatically populate a Closed Stage.
- A Canceled **Status** will automatically populate a Canceled **Stage**.
- If a controlling project is canceled, all its subordinate projects will be canceled. To cancel a
 subordinate project, it must first be disassociated from the controlling project.
 For more information, see <u>Associate/Disassociate Projects</u> in the <u>Project Development Reference</u>
 Guide.

7.5. *Project Type

The Project Type determines the options for Project Subtype, Project Stage, Project Status, Left Navigation Menu, and sections of the Letting Page.

- Construction
- Non-Let
- Alternative Delivery
- Transfer
- Feasibility Study



Be careful when changing the Project Type! If the Project Type is changed on a project that already has a completed Engineer's Estimate, the Engineer's Estimate **will be removed** when the project is saved. If the Project Type is later changed back to its original selection, the Engineer's Estimate **will not be restored**.

7.6. *Project Subtype	This value further defines the type of work that will be done or how the project will be delivered. The options for this field are dependent upon the Project Type, and include:	
Construction	 Roadway Rail Rail-Safety Ferry Boat Public Transportation Network Safety Rest Area Bridge Local Let 	
Non-Let	 Roadway Rail Rail-Safety Non Roadway Local Bridge Public Transportation Network Change Order 	
Alternative Delivery	 Design Build Design Build Maintain Design Build Operate Maintain Design Build Finance Design Build Finance Operate Maintain 	
Transfer	Transfer	
Feasibility Study	Roadway Rail	
7.7. *District	Name and district number of the District where the project is assigned based on funding. When the project is created, this value defaults to the District assigned to the project creator.	
7.8. *County	Name of the County where the project is located.	
7.9. *Highway	This represents the Highway designation and number requiring work within the project	
7.10. *Control Section	This identifies a particular section of highway.	
7.11. Letting Estimate	The most recent estimated cost of the project.	
7.12. *Estimated Let Date		

8. Engineer's Estimate Page

The Engineer's Estimate page displays the detail information regarding the project's estimate. It can only be edited by individuals with the following security roles:

- Professional Engineer
- Professional Engineer-Consultant
- Engineer Estimate Coordinator
- Engineer Estimate Coordinator Consultant
- Design Coordinator

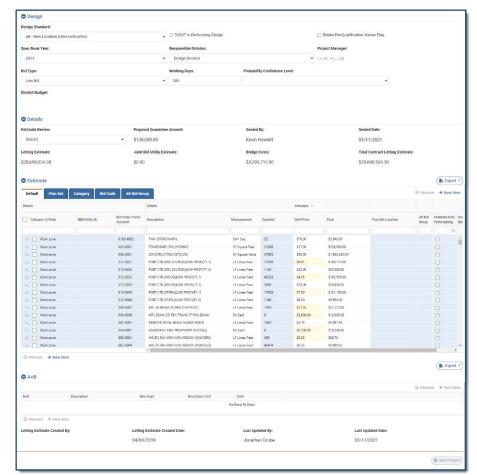
This page is always visible, but only editable when the project stage is **Preliminary Engineering**; **Plans**, **Specifications**, **& Estimates**; or **Ready to Let**. If not, this message will display at the top of the screen.



8.1. Engineer's Estimate Page Sections

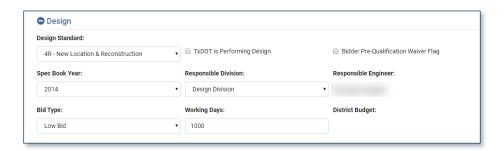
The **Engineer's Estimate** page is arranged in four sections.







The **Design** section includes the following fields:



Field		Description
Design Standard	Identifies the design criteria associated with the project.	
	2R - Restoration	Used for non-freeway resurfacing restoration projects, that are not in the National Highway System, with ADT volume of 2500 per lane or less.
	3R – Non-Freeway Rehabilitation	Used for projects that address pavement needs and/or deficiencies that substantially follow horizontal and vertical alignments.
	4R – New Location & Reconstruction	Used for projects that are either new roadways or totally reconstructed roadway sections.
	HE – Hazard Elimination Program	Used for projects (both on or off the state highway) that:
		 Correct or improve high-hazard locations. Eliminate roadside obstacles and treat obstacles. Improve highway signing and pavement marking. Install traffic control or warning devices at locations with high number of accidents.
	NA – Not Applicable	Used for projects when the Design Standard does not apply.
	PM – Preventative Maintenance	Used for projects that do not have significant amounts of distress.
	SA – Safety Appurtenances	Used for projects that incorporate division for a proposed project.
TxDOT is Performing Design	Indicates, if checked, whet	her TxDOT is performing the design.
Bidder Pre-Qualification Waiver Flag	This checkbox indicates whether vendor pre-qualification is waived.	
Spec Book Year	Indicates the four-digit spe from the drop-down. This fi	c book year being used to develop the project eld defaults to 2014.

Responsible Division	The project engineer can choose the division that will be responsible for reviewing the Estimate.
	 Maintenance Division Design Division Traffic Operations Division Bridge Division
Responsible Engineer	The TxDOT Engineer who serves as a point of contact related to this project and may or may not be the sealing Engineer. The Responsible Engineer field is populated when a Project Manager is assigned to the project. For instructions on assigning a Project Manager, see the Resources page for more information.
Bid Type	This is the type of bid used to award the contract. The selections vary by Project Type: Construction: Low Bid or A+B Bidding Alternative Delivery: Best Value
Working Days	This is the number of days required for the estimated work to be completed on the project.
District Budget	Indicates the District budget within which the project is conducted.

8.3. Details

The **Details** section includes the following fields:



Field	Description	
Estimate Review	This indicates whether the District, District Office, or the Design Division is currently working on this estimate. While the estimate is under District Office or Design Division review, it cannot be edited by those at the District level.	
	When you are ready to switch control to the opposite party,	
	 Set the Estimate Review. Click Save Project. 	
	TxDOTCONNECT validates whether the estimate before control is granted to the Design Division TxDOTCONNECT will request confirmation.	
Sealed By	Indicates the name of the Engineer who applied the Engineer's Seal to the proposal.	
Sealed Date	Indicates the date the Engineer's estimate was sealed.	
Engineer's Estimate	Sum of line items in the Engineer's Estimate not including Alternate Bid Items or Excluded Bid Items.	
Total Contract Cost	Sum of the Engineer's Estimates for all projects associated to the controlling project, including the controlling project's Engineer's Estimate.	
Total Bridge Cost	Sum of all Bridge Costs within the Engineer's Estimate, not including alternate bid items and excluded bid items.	
Proposal Guarantee Amount	The Proposal Guarantee is a monetary amount furnished in the approved form by the bidder with the bid proposal for a project to discourage frivolous bids.	
	Proposal Guarantee Amount is calculated as follows:	
	Total Construction Cost (less Force Accounts)	Amount
	\$25,000 or less	\$O
	\$25,001 up to \$4,999	\$1,000
	\$5,000 up to \$4,999,999	2% rounded to the nearest \$1,000
	\$5,000,000 or above \$100,000	

8.4. Estimate

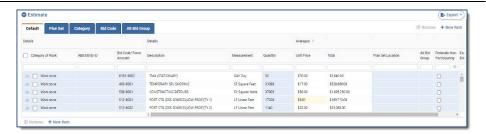
The Estimate section contains a series of grids where the bid items may be entered in the project estimate by Engineer roles (Professional Engineer, Professional Engineer-Consultant, Engineer Estimate Coordinator, Engineer Estimate Coordinator-Consultant, Design Coordinator).

This section allows the estimate to be viewed in four different ways: **Default, Plan Set, Category**, and **Bid Items**.

Default tab

The Default tab shows the bid items in the order they were entered.

It is arranged in the columns described below.

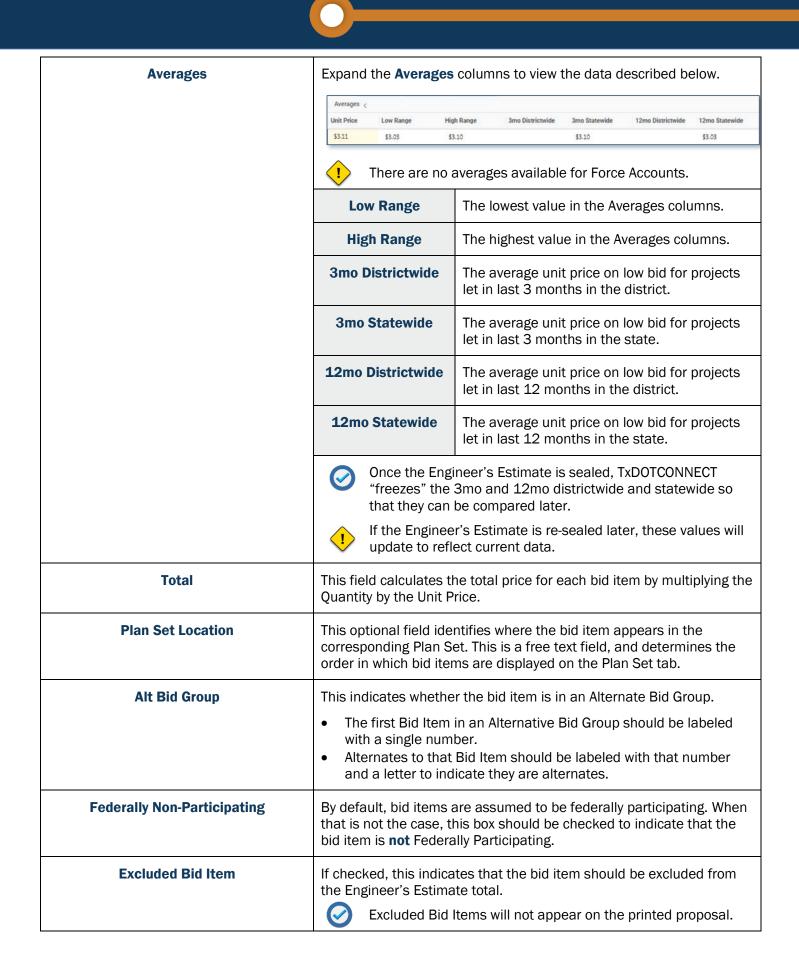




Those with Engineer roles can rearrange bid items in this view simply by clicking iiii next to any bid item and dragging into the desired order.

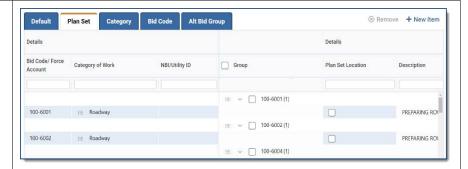
Column	Description	
Category of Work (required)	This field indicates the category of work for the bid item. The items described below have special requirements.	
(requireu)	Bridge	 This Category of Work is only available if there are Proposed Bridges listed on the Location page. An NBI Number is required. Only bridges listed in the Proposed Bridge section of the Location page will be available for selection.
	Utility	 This Category of Work is only available when Joint Bid has been selected on the Right of Way/Utilities page, meaning the utilities work will be let as part of the construction project. A Utility ID is required.
	Barricades	 The only bid code for Barricade work, 502-6001, will populate automatically. Only one row for Barricade work is allowed per project.

	Mobilization	 Only one bid code, 500-6001, is available for Mobilization work. A percentage should be entered in the Quantity field. The Unit Price (lump sum) for all associated projects will update to match that of the controlling project. Only one row for Mobilization is allowed per project.
	Force Account	Force Account values are selected in place of bid codes.
NBI Number/Utility ID	The NBI is the National Bridge Inventory number for a specific bridge. This value is only required for bid items with the Category of Work "Bridge." The number must be listed in the Proposed Bridge Work grid on the Location page or you may select a placeholder value. The Utility ID is the utility number (or U Number) for work on a utility. This value is only required for bid items with Categories of Work that begin with "Utility" (e.g., Utility – Bridge or Utility – Sewer).	
Bid Code/Force Account	 This required field consists of all the Standard and Special Specification codes except when the Category of Work is set to Force Account. This field uses type-ahead searching that requires 3 digits to be entered before returning matching results in the drop-down. If the Category of Work is set to Force Account, the Force Account numbers will be returned instead of Bid Items. To create a placeholder for a Special Specification, enter "XXXXX-XXXXX." 	
Description	The description of the selected Bid Code/Force Account. TxDOTCONNECT populates this value automatically based on the selected Bid Code/Force Account.	
Measurement	The unit of measurement used for the selected Bid Code/Force Account. TxDOTCONNECT populates this value populates automatically based on the selected Bid Code/Force Account.	
Quantity	This required field indicates	s the number of items to the nearest 0.001.
Unit Price	If the Unit Price in the Averages	is the cost per unit of the bid item. is above the high range or below the low range columns, TxDOTCONNECT highlights the value. In still be saved if the Unit Price is out of range.



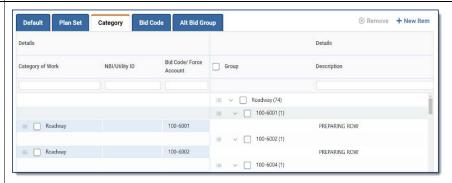


The Plan Set tab groups the bid items by plan set location.



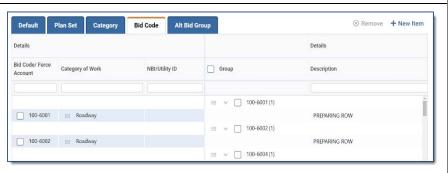
Category tab

The Category tab groups the bid items by category of work.



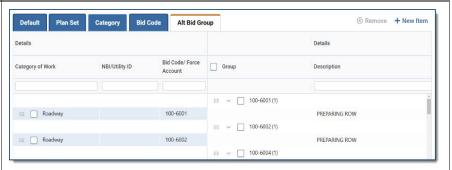
Bid Items tab

The Bid Items tab sorts the bid items in numerical order.



Alt Bid Group

Items are grouped by Category of Work and displayed in numerical order. Any bid items designated as part of an Alt Bid Group will be displayed together.



Adding and Removing Bid Items

Bid Items may be added or removed from any tab in the Estimate by those with the appropriate security role.

+ New Item

To add a bid item, click + New Item.

Remove

Select a bid item, check the box next to the item and click **Remove**.

Export Reports

The Estimate section contains Export buttons above and below the bid item grid.



Click this button to:

- Export the Engineer's Estimate to MicroStation as a PDF.
- Export the Engineer's Estimate to MicroStation as an Excel spreadsheet.
- Export the Estimate & Quantity (E & Q) Report as a PDF.
- Export the Specifications List as a PDF.
- Combined Estimate Report as a PDF.

The documents will open in the **Reporting** feature.



	Engineer's Estimate
	凶 MicroStation PDF
	MicroStation Excel
	E & Q Report
	△ PDF
	Specifications List
	△ PDF
ļ,	Combined Estimate Report
	PDF



This section allows Engineer roles to enter milestones for projects where the **Bid Type** in the **Design** section of the page is **A+B Bidding**.





- Part A is the total amount bid for the total construction cost.
- Part B is the total number of days bid per project phase/ milestone (or substantial completion) multiplied by the Road User Cost liquidated damages per day calculated for the project.
- A+B = Total Construction Cost + (Max Days x Road User Cost)



If the **Bid Type** is changed to **Low Bid**, all A+B Milestones will be deleted.

Column	Description
A+B	Bid codes from the 800 series that describe A+B provisions, as follows:
	 800-6001: NO. OF WORKING DAYS 800-6002: NO. OF DAYS MILESTONE 1 800-6003: NO. OF DAYS MILESTONE 2 800-6004: NO. OF DAYS MILESTONE 3
Description	This description is populated automatically by TxDOTCONNECT based on the bid code entered in the A+B column.
Max Days	The maximum number of days used to calculate Part B of the A+B provision.
Road User Cost	The Road User Cost used to calculate Part B of the A+B provision
Total	The maximum days multiplied by the Road User Cost.

8.6. Created By & Created Date

This section populates automatically when the Engineer's Estimate is created to show who created it and on what date.

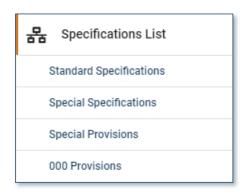


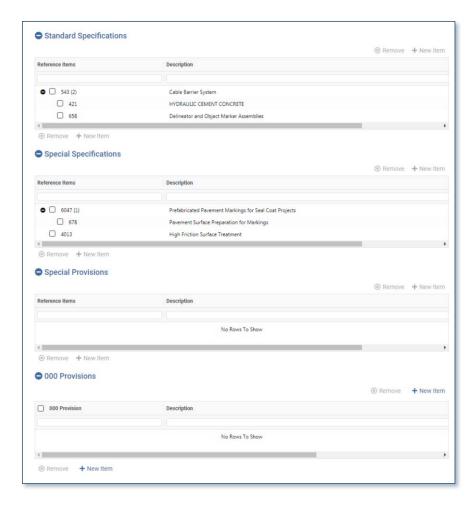
9. Specifications List

The Specifications List page is only available if there is at least one bid item row added to the Engineer's Estimate page. Some sections populate automatically based on the bid items entered in the Engineer's Estimate grid.

9.1. Specifications List Page Sections

The **Specifications List** page is arranged in the following sections:



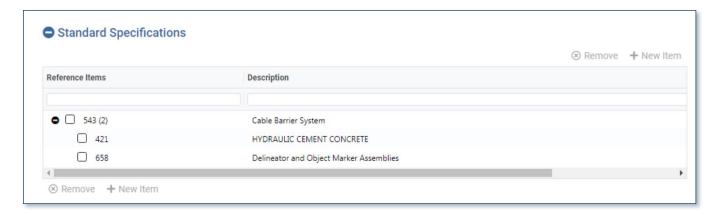


The following actions are available in each of the grids on the **Specifications List** page.

- Click to collapse the items (Standard Specifications, Special Specifications, Special Provisions, or 000 Provisions) under a Bid Item.
- Click to expand the items under a Bid Item.
- To filter by Reference Item number or description, type digits into the filter fields at the top of the grid.

9.2. Standard Specifications

The **Standard Specifications** section lists the Specifications under each of the Bid Items listed in the Engineer's Estimate grid.



Standard Specifications are those that are listed in the department's specifications book, *Standard Specifications for Construction and Maintenance of Highways*, *Streets, and Bridges*. Specifications for construction bid items or reference items usually address six areas: description, materials, equipment, construction methods, method of measurement, and method of payment.



- The number of Standard Specifications listed beneath a Bid Item is indicated in parentheses.
- A maximum of 30 Standard Specifications are allowed per Bid Item.

To add a Specification under a Bid Item,

- 1. Check

 the box next to a Bid Item.
- 2. Click + New Item. A new row will appear just beneath the Bid Item.
- 3. Click the drop-down menu in the new row.
- 4. Type the desired Specification number in the field or scroll through the list to select a Specification.

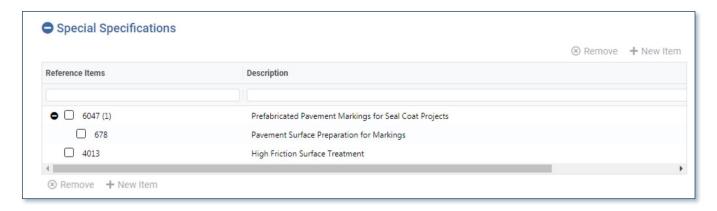
To remove a Specification under a Bid Item,

- 1. Check

 the box next to the Specification.
- 2. Click ® Remove. The row will disappear.

9.3. Special Specifications

The **Special Specifications** section lists the Special Specifications under each of the Bid Items listed in the Engineer's Estimate grid.



Special Specifications are methods and/or work items that are not covered by standard specifications. They may introduce a new description, materials, miscellaneous classification, construction methods, equipment, measurement, and/or payment articles.



The number of Special Specifications that are listed beneath a Bid Item is indicated in parentheses.

To add a Special Specification under a Bid Item.

- 1. Check

 the box next to a Bid Item.
- 2. Click + New Item. A new row will appear just beneath the Bid Item.
- 3. Click the drop-down menu in the new row.
- 4. Type the desired Specification number in the field or scroll through the list to select a Specification.

To **remove** a Specification under a Bid Item,

- 1. Check

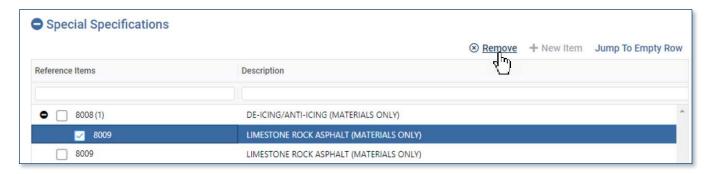
 the box next to the Specification.
- 2. Click ® Remove. The row will disappear.



If you add a Special Specification as a Reference Item (child item) under another Special Specification (parent item), the Special Specification will appear both as a child item referenced under the original special specification and as a new parent item. This allow you to add more reference items under the new special specification.



If you remove the Special Specification child item, the Special Specification parent item will be removed too. In the example below, clicking Remove now will remove both instances of Special Specification 8009.



9.4. Special Provisions

The **Special Provisions** section lists the Special Specifications under each of the Bid Items listed in the Engineer's Estimate grid.



Special Provisions modify Standard Specifications or Special Specifications.



- The number of Special Specifications that are listed beneath a Bid Item is indicated in parentheses.
- A maximum of 10 Special Provisions are allowed per Bid Item.



The Special Provisions available for selection depends on:

- Whether the project has a Federal Project ID or State Project ID (the appropriate provisions populate automatically, but may be removed)
- The Bid Codes listed under Standard Specifications and Special Specifications.

9.5. 000 Provisions

The **000 Provisions** ("Triple Zero" Provisions) section lists the Triple Zero Specifications under each of the Bid Items listed in the Engineer's Estimate grid.



Triple Zero Provisions describe, in narrative form, conditions included in a contract which do not relate directly to a work item specification.



The number of Triple Zero Specifications that are listed beneath a Bid Item is indicated in parentheses.

10. Sealing & Summary Page

The Sealing & Summary page contains a list of all associated projects with a Seal button.

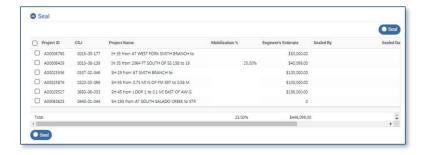
10.1. Seal Table

The **Seal Table** provides a summary of all the projects associated to the controlling project.



This grid is only editable from the **controlling project**.

The grid on this page contains the following columns.





Projects are associated for letting purposes on the **Letting Page**, described in the **Project Development Reference Guide**.

Column	Description		
Project ID	The Project Identifier for each associated project.		
-	The Project identifier for each associated project.		
CSJ	The Control Section Job for each associated project.		
Project Name	The Project Name for each associated project.		
Mobilization %	The Mobilization percentage for each associated project.		
	! The following guidelines should be observed:		
	Mobilization % can only be edited from the controlling project's Sealing & Summary page.		
	 The total Mobilization % for all associated projects must be equal to 100%, 0%, or blank in order to seal the controlling project or to seal all projects. The Mobilization unit price of all subordinate projects must match the controlling project's Mobilization unit price. When a new project with Mobilization is associated to a controlling project with Mobilization, the Mobilization unit price for the new project automatically updates to match the controlling project. 		
	If Mobilization is not being used as a category of work on any project's engineer's estimate, this field will be blank and disabled for that project.		
Engineer's Estimate	The total Engineer's Estimate amount for each associated project.		
Sealed By	The name of the engineer who has sealed the estimate for each associated project (if already sealed).		
Sealed Date	The date the Engineer's Estimate was sealed.		
Net Bridge Miles	This optional field allows for future reporting to determine the average estimated cost of each Net Bridge Mile.		
Net Roadway Miles	This optional field allows for future reporting to determine the average estimated cost of each Net Roadway Mile.		

Total

At the bottom of the Seal table is the Total row.

This row shows the total percentage for Mobilization and the total Engineer's Estimate for all combined associated projects.



10.2. Seal Button

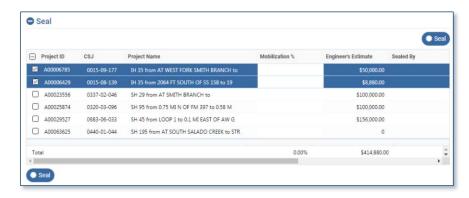
The Seal Button is only enabled for a Professional Engineer or Professional Engineer-Consultant.



The Seal function can only be performed from the **Controlling Project**.

To Seal (or Re-Seal) an Estimate:

- **1.** Check ✓ the box (or boxes) next to the project(s) to seal.
- 2. Click Seal.





To select all projects, or unselect all projects, check \square the top box next to **Project ID**.

TxDOTCONNECT validates the following:

- There must be at least one bid item entered in the **Estimate** grid on the **Engineer's Estimate** page, and all bid items must have a unit price and quantity defined.
- The Estimate Review field on the Engineer's Estimate page must have "District" selected.
- No placeholder values (bid code placeholders or NBI placeholders) can remain in the Engineer's Estimate or Specifications List.
- All bid items with Category of Work "Bridge" must have an NBI selected.
- If the project's Bid Type is set to A+B, the A+B section must include working days.
- There must be a Responsible Engineer listed on the **Resources** page.
- There must be a current License number on file for the sealing engineer on the Profile page.
- To seal the *controlling* project or *all* projects, the Mobilization % for all associated projects must total 0%, 100%, or be blank.
- If the estimate includes items with Category of Work: Bridge, the Proposed Bridge section of the Location page should be complete. If bridge information is missing, TxDOTCONNECT displays a warning message. You may click OK to seal the estimate with missing bridge information.

TxDOTCONNECT **populates** the following:

- The **Sealed Date**.
- The engineer's name under Sealed By.



Once the Engineer's Estimate is sealed, TxDOTCONNECT "freezes" the 3mo and 12mo districtwide and statewide **Averages** data so that they can be reviewed later.



If the Engineer's Estimate is later re-sealed, the **Averages**, **Sealed Date**, and **Sealed By** will update to reflect current data.

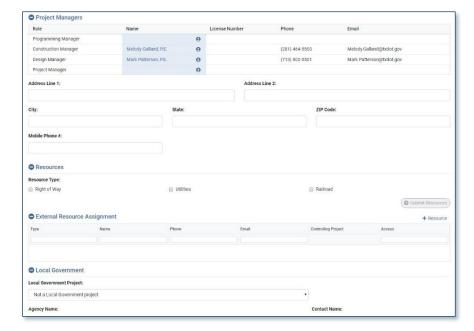
11. Resources Page

The Resources page is where additional Resources can be assigned to the Project.

11.1. Resources Page Sections

The Resources page is arranged in three sections:





11.2. Project Managers

The **Project Managers** section of the Resources page lists the staff resources assigned to the project.

1. Click next to the desired role to assign a resource to it.

The selection window will appear.

- Use the column headers to sort or filter by Name, District/ Division, Location, or Email.
- **3.** Select the desired project manager.
- 4. Click Done.

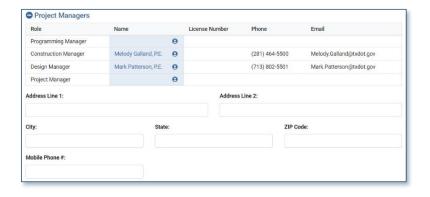
The employee's name and contact information will display.

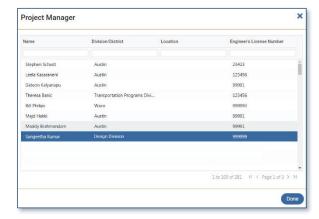


An Engineer can be selected as Project Manager only if a current License is on file in TxDOTCONNECT.



A Project Manager is required before an Engineer's Estimate can be sealed.





11.3. Resources

The **Resources** section allows users with project manager security roles to request internal Right of Way (ROW), Utilities, or Rail Road resources.



- 1. Check the box next to the desired resource.
- 2. Click Submit Resources
- 3. The appropriate group will receive the request and choose to approve or not approve.

The status of this request can be tracked on the Workflow, Forms, & Templates page.



Only one pending resource request is allowed for each resource type.

11.4. External Resources Assignment

The **External Resources Assignment** section allows the following roles to invite external engineers and coordinators to work on a project:

- Project Manager Initiate
- Project Manager Development
- Professional Engineer
- Professional Engineer Consultant
- Engineer's Estimate Coordinator
- Engineer's Estimate Coordinator
 - Consultant

Follow the process below:

1. Click + Resource.

The **External Resources** selection window will appear.

- 2. Use the column headers to sort or filter by Name, Email, or Phone.
- 3. Check \square the box next to the desired external resource.
- 4. Click Done.



Remember: Only external resources who already have access to TxDOTCONNECT with the following security roles will be available for assignment:

- Professional Engineer-Consultant
- Engineer's Estimate Coordinator-Consultant

The invited resource will receive an email notifying them they have been granted permission to the **Engineer's Estimate** and **Specifications List** for the project.

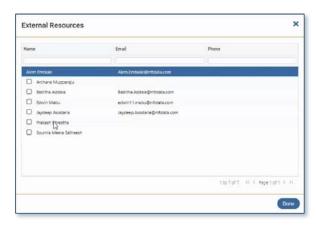


External resources may only view or edit projects to which they have been invited.



Those with appropriate security roles may **Enable** and **Disable** the access of external resources at any time using the **Access** switch.



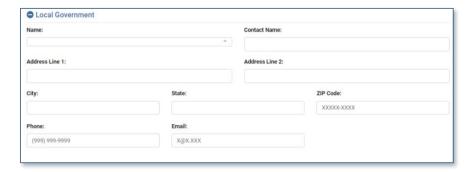






11.5. Local Government

The **Local Government** section allows users with project manager security roles to add information about Local Government resources involved with the project.



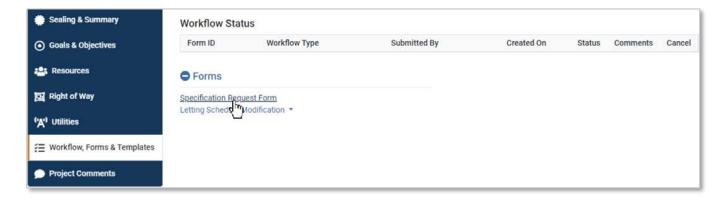
12. Specifications Request Management

The Specifications Request Form allows an authorized user to submit a request for a new or modified specification to be available for use in the Engineer's Estimate. In addition to the specification itself, the request may propose associated reference items, bid codes, special provisions, and 000 provisions to be included in a project's proposal.

Specifications Requests may be created from the project's **Workflow**, **Forms & Templates** page, or from the **Create Specifications Request** feature in the **Administrative** module. Departmental Material Specifications (DMS) and Test Procedures requests may only be created from the **Administrative** module.

12.1. Creating a Specifications Request

Workflow, Forms, & Templates



From within a project,

- 1. Select the Workflow Forms & Templates page in the Left Navigation Menu.
- 2. Click **Specifications Request** in the **Forms** section of the page.

Administrative Module



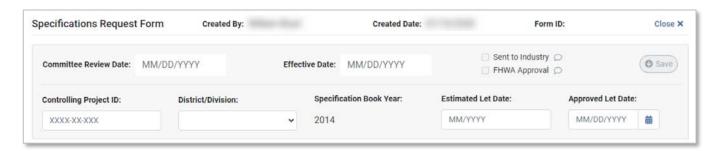
From any page in TxDOTCONNECT,

- **1.** Click **Administrative** in the top menu bar.
- 2. Hover over Create Specifications Request.
- 3. Select from the following options
 - Specification Request Form
 - DMS (Departmental Material Specifications)
 - Test Procedures

12.2. Completing the Specifications Request Form

Once the **Specifications Request Form** is selected and displayed, complete all applicable fields. Each section of the form is described in detail below.

Specifications Request Form Header



Some fields in the header require entry only if the form is created from the **Administrative** module. If the form is created from the **Workflow, Forms & Templates** page, these fields populate automatically and no user action is required.

- 1. Enter the **Controlling Project ID**, also known as the Controlling CSJ. This field is required for **One Time Use** requests.
- When this value is entered, TxDOTCONNECT automatically populates the **District/Division**, **Estimated Let Date**, and **Approved Let Date**.

If the project entered does not exist, TxDOTCONNECT displays an error message.



- The Created By and Created Date fields populate automatically when the form is created.
- The **Form ID** is a unique **13**-digit identifier that begins with the letters FM. It is generated automatically by TxDOTCONNECT when the form is saved, even if not completed or submitted.
- Click Close X at any time to close and cancel the request form.
- The Committee Review Date and Effective Date fields and the Sent to Industry and FHWA Approval
 indicators will be completed by /for the Specifications Coordinator.

Form Sections by Request Type

The table below identifies which sections of the form must be completed for each request type.



Note that all request types require a Change Summary, and all but Bid Code Only requests require a File Upload.

Request Type	Specification	Bid Code	Special Provision	000 Provision
One Time Use (OTU) Identical for Project for Special Specification (SS)				
OTU Identical for Project for Special Provision (SP)			Ø	
OTU Identical for Project for Special Specification	Ø			
with New Bid Codes (2 Forms Needed)				
OTU Identical for Project for Special Provision			Ø	
with New Bid Codes (2 Forms Needed)				
OTU Special Specification (SS) with New Bid Codes				
OTU Special Provision (SP) with New Bid Codes				
Special Provision (SP) 000				

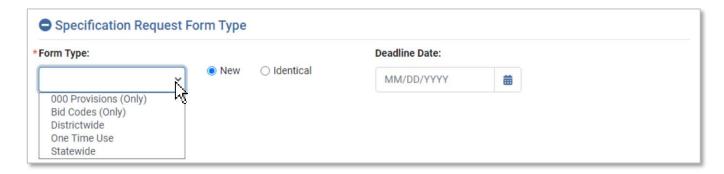


Select the appropriate Project Type for the Request entered (Construction, Construction and Maintenance, or Maintenance).

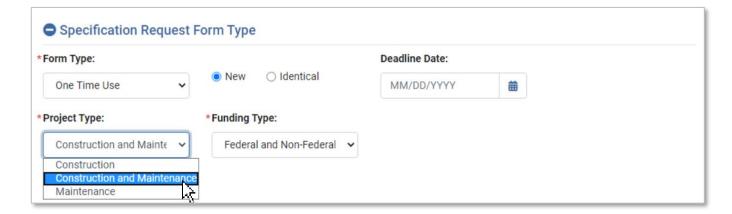


For corrections to completed One Time Use (OTU) Specifications and 000 Documents please email cst_rbwy_specs@txdot.gov

Specifications Request Form Type Section



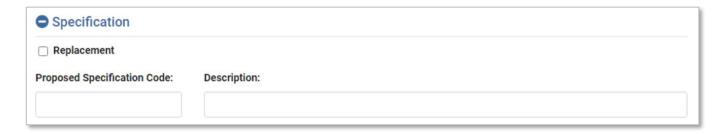
- **1.** Select the **Form Type**.
- 2. Indicate whether this is a **New** or **Identical** specification request.
- 3. Enter a **Deadline Date** if applicable.
- This helps the Specifications Coordinator to prioritize your request. If your request is an addendum or needs to be completed in time for an upcoming Letting, make sure you use this field!



- 4. Select a Project Type. This field defaults to both Construction and Maintenance, but either can be chosen.
- 5. Select a Funding Type. This field defaults to both Federal and Non-Federal, but either can be chosen.

Specification Section

As noted above, the Specification section is **disabled** for **Bid Codes (Only) and 000 Provisions (Only)** form types and all **Identical** requests.



- **1.** Indicate if this specification is a replacement specification.
- Replacement specifications require an **Existing Specification Code**. Its description and current reference items will populate automatically.



- 2. Enter the **Proposed Specification Code**. This must be formatted as [0-9]XXX.
- 3. Enter the **Description** for the proposed specification code (up to 80 characters).



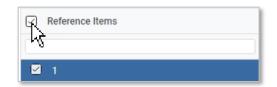
To add reference items to a proposed specification code,

4. Click + New Item, above and to the right of the table.

A new row will appear.

5. Enter the number for a reference item in the **Reference Items** column.

The **Description** populates automatically.



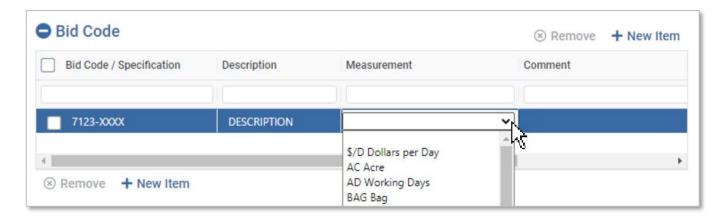


- To remove a reference item, check the box next to it to select it, then click

 Remove.
- To select all reference items, check the box next to the Reference Items column header.
- To sort the list of refrence items, click the column header.
- To filter the list of reference items, type in the field at the top of the column.

Bid Code Section

As noted above, the Bid Code section is disabled for 000 Provision (Only) forms.

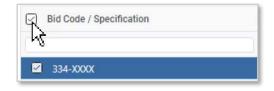


To add bid items to a request,

1. Click + New Item, above and to the right of the table.

A new row will appear.

- 2. Enter the number for a bid code in the **Bid Code/Specification** column.
- 3. Enter a proposed **Description (up to 40 characters).**
- 4. Select a Measurement.





- To remove a bid code, check the box next to it to select it, then click ⊗ Remove.
- To select all bid codes, check the box next to the Bid Code/Specification column header.
- To sort the list of bid codes, click the column header.
- To filter the list of bid codes, type in the field at the top of the column.

Special Provision Section



To add special provisions to a request,

1. Click + New Item, above and to the right of the table.

A new row will appear.



- **2.** Enter the special provision code in the **Special Provision** column.
- 3. Enter a proposed **Description** (up to 140 characters).



- **6.** Indicate if this special provision is **Replacing** an existing special provision.
- Replacing specifications require an **Existing Special Provision**.
- 7. Indicate whethr this special provision should be **Required** or **Optional**.





- To remove a special provision, check the box next to it to select it, then click Remove.
- To select all special provisions, check the box next to the **Special Provision** column header.
- To sort the list of special provisions, click the column header.
- To filter the list of specical provisions, type in the field at the top of the column.

000 Provision Section

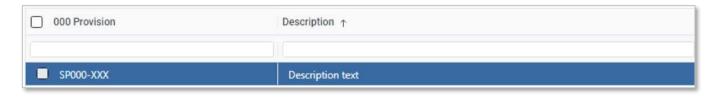
As noted above, the **000 Provision** section is **disabled** for **Bid Codes (Only)** requests.



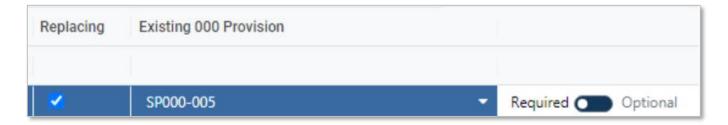
To add 000 provisions to a request,

4. Click + New Item, above and to the right of the table.

A new row will appear.



- **5.** Enter the 000 provisino code prefix in the **000 Provision** column.
- 6. Enter a proposed Description (up to 140 characters).



- 8. Indicate if this 000 provision is **Replacing** an existing 000 provision.
- Replacing specifications require an **Existing Special Provision**.
- 9. Indicate whethr this special provision should be **Required** or **Optional**.





- To remove a special provision, check the box next to it to select it, then click
 Remove.
- To select all special provisions, check the box next to the **Special Provision** column header.
- To sort the list of 000 provisions, click the column header.
- To filter the list of 000 provisions, type in the field at the top of the column.

Change Summary and Comments



- **1.** Enter a clear and concise summary of the proposed change in the **Change Summary** field (up to 250 characters). This is **required**.
- 2. Enter any additional comments to reviewers in the **Comments** field (up to 250 characters). This is optional.

File Upload

At least one template is required to submit a Specifications Request Form. Additional information about templates can be found on TxDOT.gov.



To attach a file to a Specifications Request Form,

- 1. Click **Browse**. The File Explorer will open.
- 2. Select the appropriate file.



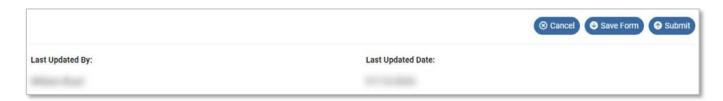
- Most users may only upload Rich Text Format (.rtf) files.
- Specifications Coordinators may upload Portable Document Format (.pdf) files.
- **3.** Click **Open**. The selected file will appear in the Browse field.
- **4.** Select a **Document Type**.
- 5. Click **Upload**. The uploaded file appears in the grid below.





To remove a file, click 8 under **Remove**.

Save, Submit, Cancel



- Click Save Form to save the Specifications Request Form and assign it a Form ID. The form does not need to be complete.
- Click Submit to submit the Specifications Request Form for review and approval through the workflow (described below).
- Click a cancel a saved or submitted form. This removes submitted requests from the workflow.



Departmental Material Specifications (DMS)

The DMS request allows you to request new Departmental Materials Specifications.

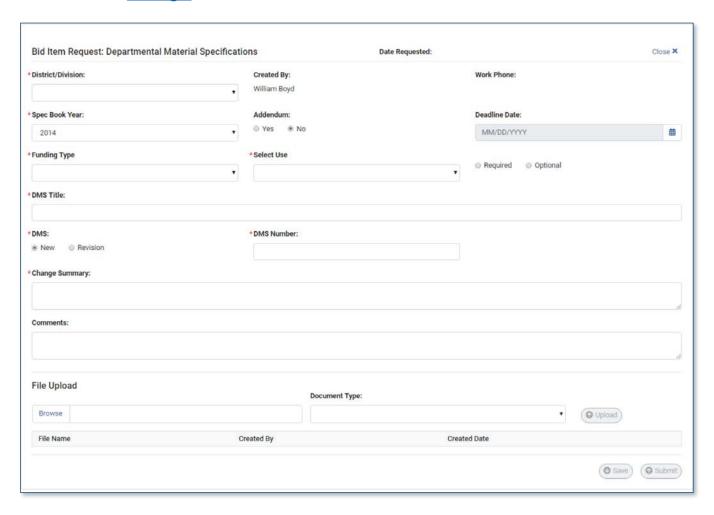


Fields with a * are required.

The **Deadline Date** is only required if you select "Yes" under **Addendum**.



This request allows you to attach **Proposed Item Templates**. Additional information about templates can be found on <u>TxDOT.gov</u>.



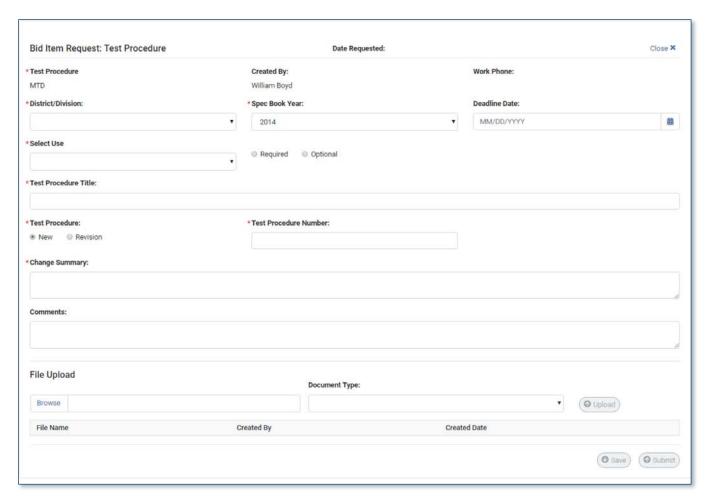
Test Procedure

The Test Procedure request allows you to request new test procedures.



Fields with a * are required.



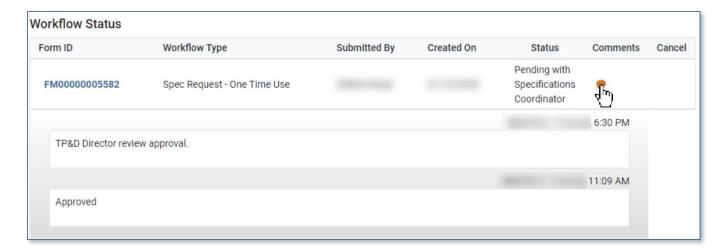


12.4. Checking the Status of Specifications Request

Once submitted, the status of a Specifications Request can be checked in two ways:

- Return to the project's Workflow, Forms & Templates page (project-specific requests only).
- Use the Forms Search functionality in the Administrative menu (all requests).

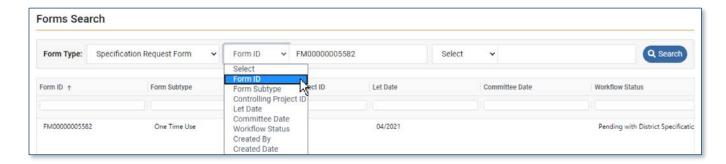
Workflow Forms & Templates Page





- Click the Form ID to open the form and view more detailed information.
- Click next to a request to display reviewer comments.
- While a request is pending on a project, you cannot create a new one of the same type.

Forms Search

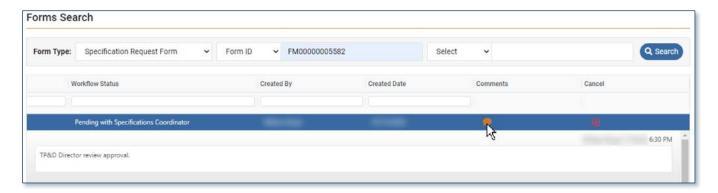


To search for a specific form,

- **1.** Use the **Form Type** drop-down menu to select the desired Form Type (request type).
- 2. Use the **Select** drop-down menus to select up to two search criteria.
- 3. Enter up to two search terms (one in each Search field).
- 4. Click Q Search.

The **Search Results** will appear.

- Click a column header to **sort** search results by the data in that column. Click again to reverse the order.
- Type into one or more of the column header fields to **filter** search results by the data in that column.



- Click next to a form to display reviewer comments.
- Click 8 next to a form to cancel it. A comment is required when canceling.

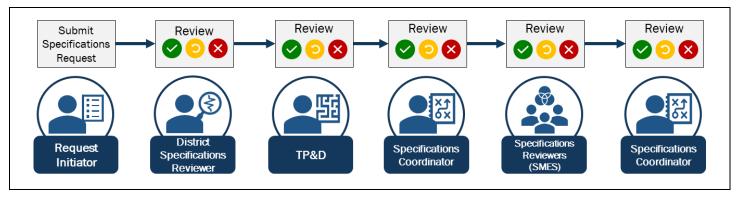
12.5. Specifications Request Form Workflows

Once a Specifications Request Form has been submitted, it is routed through an automated workflow. The workflow differs for each Form Type.

Workflow: One Time Use and Bid Code (Only)

The **One Time Use** and **Bid Code (Only)** request forms follow the workflow described below. Each reviewer may select from the following options:

- **Approve** the request continues to the next step in the workflow.
- Return the Request Initiator recieves the request to make changes, save, and resubmit.
- **Do Not Approve** the Request Initiator receives a notification and the workflow **ends**.

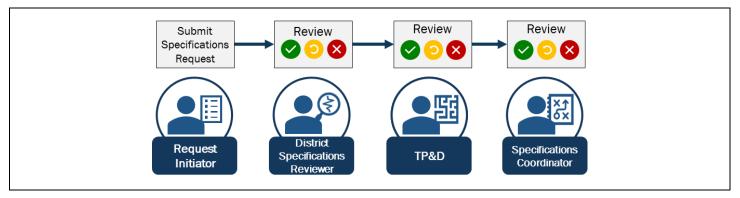


- **1.** The Request Initiator creates and submits the Specifications Request Form. The form is routed to the submitter's District Specifications Reviewer.
- If there is no designated District Specifications Reviewer in the Request Initiator's district, the request skips this step and goes directly to the TP&D Director in the Request Initiator's district.
- 2. The District Specifications Reviewer reviews the request. If approved, the form is routed to the TP&D Director in the Request Initiator's district.
- If there is more than one District Specifications Reviewer in the Request Initiator's district, only one approval is required for the form to move forward in the workflow.
- 3. The TP&D Director reviews the request. If approved, the form is routed to the Specifications Coordinator.
- **4.** The Specifications Coordinator reviews the request. If approved, the Specifications Coordinator assigns the form to one or more Specifications Reviewers (also referred to as Subject Matter Experts, or SMEs).
- **5.** Each Specifications Reviewer reviews the request. If all Specifications Reviewers approve, the form is routed once more to the Specifications Coordinator.
- 1
- All Specifications Reviewers must approve the request for it to move forward in the workflow.
- If a Specifications Reviewer is assigned in error, submit a TxDOT Now ticket for resolution.
 If an individual assigned in error selects Return or Do Not Approve, the form will route all the way back to the Request Initiator, and all review steps must be repeated.
- **6.** The Specifications Coordinator performs the final review and approval, and also performs certain tasks outside of TxDOTCONNECT to ensure the new specification is added to the database.

Workflow: Districtwide, Statewide, and 000 Provision (Only)

The **Districtwide**, **Statewide**, and **000 Provision (Only)** request forms follow the workflow described below. Each reviewer may select from the following options:

- **Approve** the request continues to the next step in the workflow.
- Return the Request Initiator recieves the request to make changes, save, and resubmit.
- **Do Not Approve** the Request Initiator receives a notification and the workflow **ends**.



- **1.** The Request Initiator creates and submits the Specifications Request Form. The form is routed to the submitter's District Specifications Reviewer.
- If there is no designated District Specifications Reviwer in the Request Initiator's district, the request skips this step and goes directly to the TP&D Director in the Request Initiator's district.
- 2. The District Specifications Reviewer reviews the request. If approved, the form is routed to the TP&D Director in the Request Initiator's district.
- If there is more than one District Specifications Reviewer in the Request Initiator's district, only one approval is required for the form to move forward in the workflow.
- 3. The TP&D Director reviews the request. If approved, the form is routed to the Specifications Coordinator.
- **4.** The Specifications Coordinator reviews the request and coordinates approval with multiple stakeholders, depending on the nature of the request.

If approved, the Specifications Coordinator enters final review comments on the form, uploads files as required, and performs certain tasks outside of TxDOTCONNECT to ensure the new specification is added to the database.

12.6. Reviewing Specifications Requests

The following roles may be responsible for reviewing and approving a Specifications Request Form.

- District Specifications Reviewer
- TP&D
- Specifications Coordinator
- Specifications Reviewer

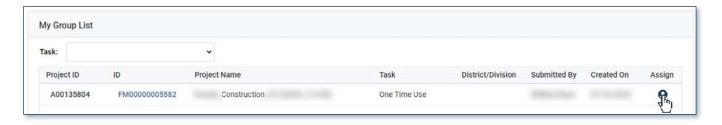
All reviewers perform their review in the My Group List and My Tasks sections of the TxDOTCONNECT Home Page.

- If there is more than one user with the applicable reviewer role, the request appears in **My Group List**. It must then be assigned to an individual user to be reviewed.
- If there is only one user with the applicable reviewer role, the request appears in My Tasks.

My Group List

My Group List acts as a work queue from which a group of individuals with the appropriate security role may assign a task to an individual for review.

For example, District A has three District Specifications Reviewers: Alice, Bryan, and Charlie. All three see a new request in **My Group List**. Alice assigns the task to herself for review and the request moves to her **My Tasks** section. Bryan and Charlie can no longer see it.

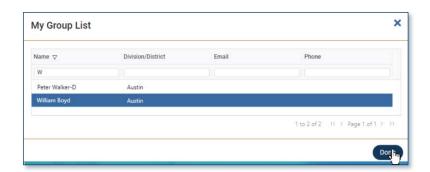


1. Click next to a task in My Group List.

The My Group List window will appear. You can filter the list by Name, District/Divisions, Email, or Phone.

- 2. Select the person who will review the task (this may be yourself).
- 3. Click to complete the assignment.

The task moves from **My Group List** to the reviewer's **My Tasks**.

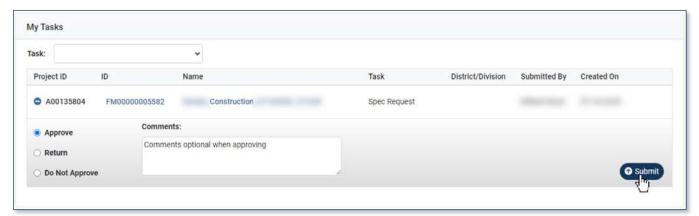


My Tasks

My Tasks acts as a list of requests for review by an individual.



If your security role changes, requests in My Tasks will remain until approved, returned, or not approved.



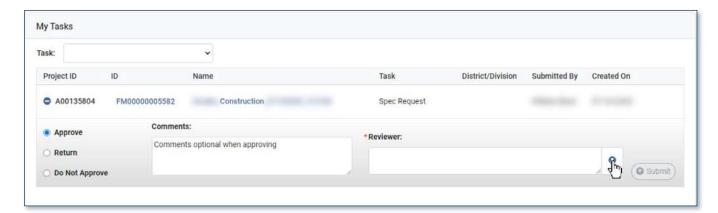


- Click the Form ID to view the request.
- Click the **Project Name** to view the project.
- 1. Decide whether to Approve, Return, or Do Not Approve the request.
 - Approve the request continues to the next step in the workflow.
 - Return the Request Initiator recieves the request to make changes, save, and resubmit.
 - Do Not Approve the Request Initiator receives a notification and the workflow ends.
- 2. Enter comments if desired. This is required if the selection is **Return** or **Do Not Approve**.
- 3. Click Submit.

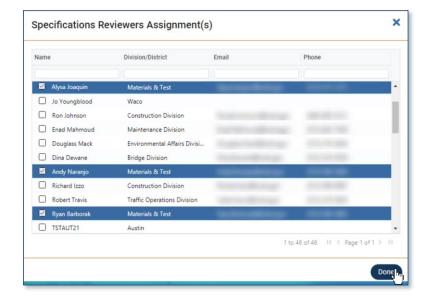
12.7. Additional Steps for Specifications Coordinators

Specifications Coordinators have a few additional considerations when reviewing a Specifications Request Form.

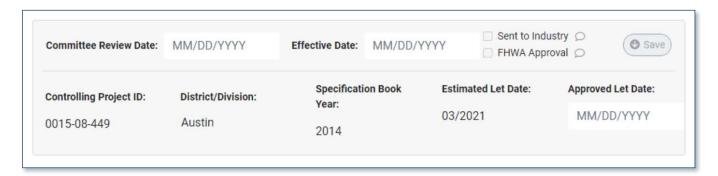
For One Time Use and Bid Code (Only) forms, Specifications Coordinators must assign Specifications Reviewers.



- 1. Click 9 to open a list of Specifications Reviewers.
- 2. Select one or more Specifications Reviewers.
- 4. Click Done.
- 5. Click Submit.



For **Districtwide**, **Statewide**, and **000 Provision** (**Only**) request forms, Specifications Coordinators must enter comments from Industry and FHWA and enter the date the request was approved by the Specifications Review Committee. This information is entered on the form's Header.



13. Letting Module: Contract Inquiry Search

The Letting tab leads to the Contract Inquiry Search, which displays information about projects that have already let, the vendors who were awarded the contract.

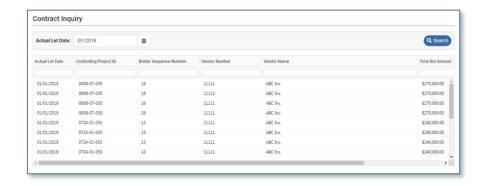


When you select Letting from the Top Menu Bar, the menu offers the following options:

13.1. Contract Inquiry Search

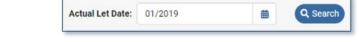
There are two parts on this page:

- The Actual Let Date search
- The Search Results



13.2. Actual Let Date Search Feature

Enter a month in the **Actual Let Date** field, then click to find projects with that Actual Let Date.



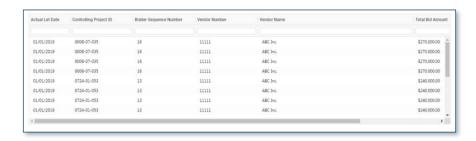


You can also click in to use the **calendar tool** to select the month.



The search results display the projects that have an actual let date matching your search criteria.

These search results display information arranged in the following columns:



Column	Description		
Actual Let Date	The project's actual let date.		
Controlling Project ID	The project's Controlling Project ID.		
Bidder Sequence Number	The Bidder Sequence Number of the vendor who bid on the contract.		
Vendor Number	The Vendor Number of the vendor who bid on the contract.		
Vendor Name	The name of the vendor who bid on the contract.		
Total Bid Amount	The total amount that was bid by the vendor.		
Let Code	Indicates the status of the contract, with the following descriptions: • Before and During Letting Process		
	 Bids Entered and Verified Bidder Awarded on this Contract Bids Rejected for this Contract 		

14.Revision History

Version	Date	Name	Change Description	
2.0.0	6/17/19	Ernie Roth	Initial layout.	
2.0.1	8/18/19	Will Boyd	First draft review and incorporate feedback.	
2.0.2	8/21/19	Will Boyd	Updated based on Sprint 22 functionality.	
2.0.3	12/02/19	Steve Chavez	Updated based on Sprint 25 and 26. Updated images for change removing "Milestones".	
			"Responsible Engineer" label changed to "Project Manager".	
			Engineer's Estimate description/calculation updated.	
			"Total Construction Cost" updated to "Total Contract Cost".	
			Added Proposal Guarantee Amount and calculation.	
			Updated Force Account description.	
			Updated text and images in the Project Managers section to reflect label changes to "Programming Manager" and "Project Manager".	
2.1.0	7/20/20	Will Boyd	Updates to Specifications Request Form.	
2.2.0	5/24/20	Will Boyd	Engineer's Estimate Bulk Upload.	